Everest Group PEAK Matrix® for Amazon Web Services (AWS) System Integrators (SI) 2021

Focus on Accenture
November 2020

Introduction and scope

Everest Group recently released its report titled "System Integrator (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2021". This report analyzes the changing dynamics of the AWS public cloud landscape and assesses system integrators across several key dimensions.

As a part of this report, Everest Group updated its classification of 27 system integrators on the Everest Group PEAK Matrix® for SI capabilities on AWS into Leaders, Major Contenders, and Aspirants. The PEAK Matrix® is a framework that provides an objective, data-driven, and comparative assessment of AWS system integrators based on their absolute market success and delivery capability.

Based on the analysis, **Accenture emerged as a Leader**. This document focuses on **Accenture's** SI capabilities on AWS and includes:

- Accenture's position on the SI capabilities on AWS PEAK Matrix®
- Detailed AWS services profile of Accenture

Buyers can use the PEAK Matrix® to identify and evaluate different system integrators. It helps them understand the system integrators' relative strengths and gaps. However, it is also important to note that while the PEAK Matrix® is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements and match them against system integrator capability for an ideal fit.

Background of the research

- Enterprise consumption of cloud has witnessed a dramatic shift, from a skeptical outlook towards public cloud to going all in on public cloud, in the last few years. More than 90 percent of enterprises already leverage one or more public clouds in their enterprise environment

- COVID-19 has further accelerated enterprise migration to public cloud as most enterprises could see clear business continuity benefits during the pandemic. Contrary to an expected slowdown due to COVID-19, most enterprises have accelerated their digital transformation efforts with migration to public cloud being a key transformation lever

- Being the market leader, AWS has witnessed a spike in adoption for its products across compute, storage, applications, data & analytics, IoT, and blockchain. AWS has also undertaken several COVID-19 initiatives to help customers in ensuring business continuity in the areas of remote work & learning, research, and other initiatives. This has led to a proliferation of AWS offerings in the market, which coupled with management complexities, and talent crunch is pushing enterprises to seek third-party support. System integrators help enterprises in navigating the AWS landscape across infrastructure, platform, data, and next-generation technology segments

- In this research, we present an assessment and detailed profiles of 27 system integrators featured on the SI capabilities on AWS PEAK Matrix®. Each system integrator profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies.

- The assessment is based on Everest Group's annual RFI process conducted over 2020, interactions with AWS cloud system integrators, client reference checks, and an ongoing analysis of the cloud services market.

This report assessed the following 27 system integrators on the SI capabilities on AWS PEAK Matrix® :

- **Leaders**: Accenture, Capgemini, Cognizant, DXC Technology, HCL Technologies, Infosys, TCS, and Wipro
- **Major Contenders**: Blazeclan, Brillio, Cloudreach, Ensono, Genpact, GFT, LTI, Microland, Mphasis, NTT DATA, Sopra Steria, Tech Mahindra, Trianz, UST Global, and Virtusa
- **Aspirants**: Aspire System, Coforge, Cybage, and Zensar

Scope of this report:

Geography
Global

System Integrators
27 leading cloud system integrators

Services
Cloud services

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System Integrator (SI) Capabilities on AWS PEAK Matrix® characteristics

Leaders:

Accenture, Capgemini, Cognizant, DXC Technology, HCL Technologies, Infosys, TCS, and Wipro

- Leaders have established successful businesses in AWS services, driven by capability building and experience across the infrastructure, platform, data, and next-generation capabilities
- These players continue to proactively drive investments in next-generation technology themes and build strategic roadmaps for AWS services (internal IP/tools, partnerships, and acquisitions)
- Leaders have a strong focus on driving alignment between the business and IT teams of enterprises to drive higher value through contextual solutions tailored to specific enterprise requirements
- All Leaders have a strong focus on driving large-scale/complex cloud transformation, specifically for the large enterprise segment (with annual revenue greater than US$5 billion)

Major Contenders:

Blazeclan, Brillio, Cloudreach, Ensono, Genpact, GFT, LTI, Microland, Mphasis, NTT DATA, Sopra Steria, Tech Mahindra, Trianz, UST Global, and Virtusa

- Major Contenders in the AWS services space include born-in-the-cloud system integrators as well as Indian-heritage system integrators
- While global players strongly leverage/include their assets and datacenter footprint along with their AWS services offerings, "asset-light" providers leverage their partner technology ecosystem to provide these services
- These companies continue to invest aggressively in building their IP, partnership ecosystem, and delivery capabilities across the AWS services spectrum, as well as in increasing their global coverage

Aspirants:

Aspire System, Coforge, Cybage, and Zensar

- The AWS services business of Aspirants is in the initial stages of asset and capability maturity
- While these system integrators are making investments to build delivery capabilities and IP/tools, they will also need to develop and strengthen advisory and design services capabilities on AWS to build market awareness and credibility as strategic transformation partners for enterprises

Everest Group PEAK Matrix®
System Integrator (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2021 | Accenture positioned as Leader

Everest Group System Integrator (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2021
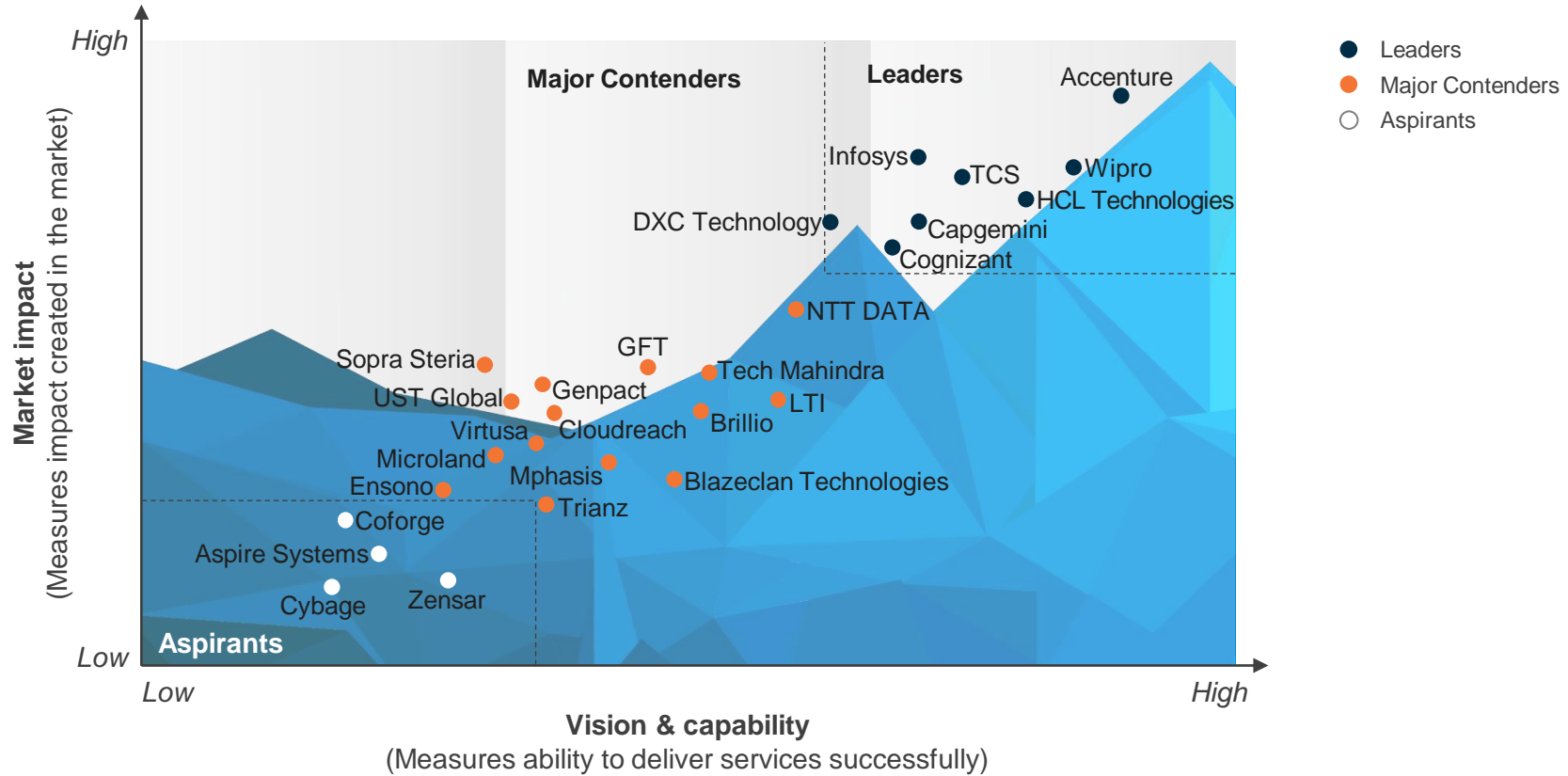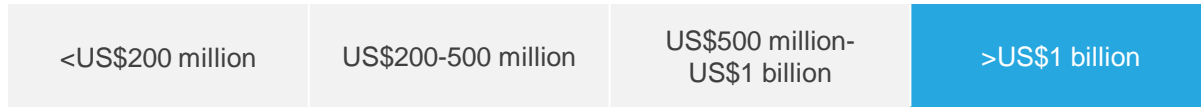

Source: Everest Group (2020)

Accenture | system integrator capabilities on AWS (page 1 of 4)
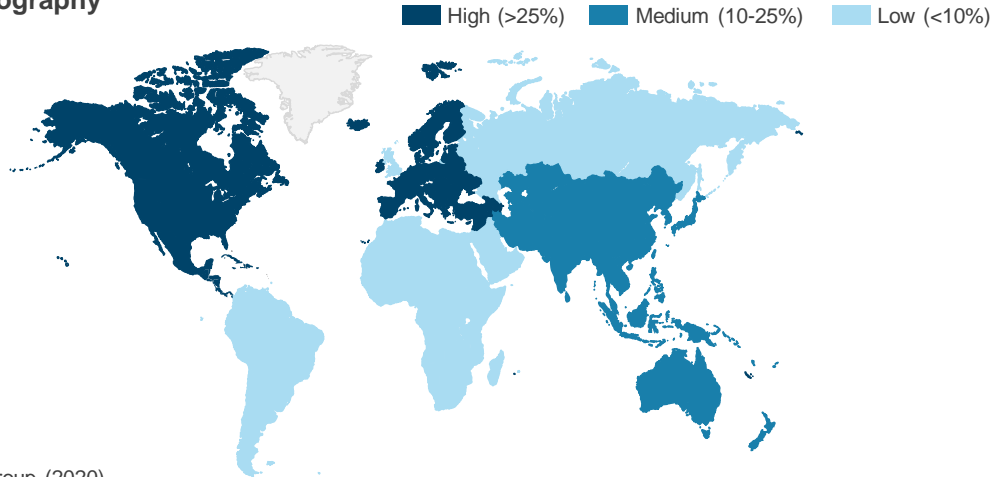## Overall cloud services overview

Cloud services vision

Accenture's vision is to help its clients leverage cloud at the enterprise level to unshackle themselves from capital-intensive capabilities that are not related to their core business. It wants to define and implement the right cloud solution for its clients' business, both from a present and future perspective. The formation of Accenture Cloud First, with a US$3 billion investment over three years, will focus on developing new capabilities, solutions, partnerships, and client engagements with the aim to help clients innovate quickly.
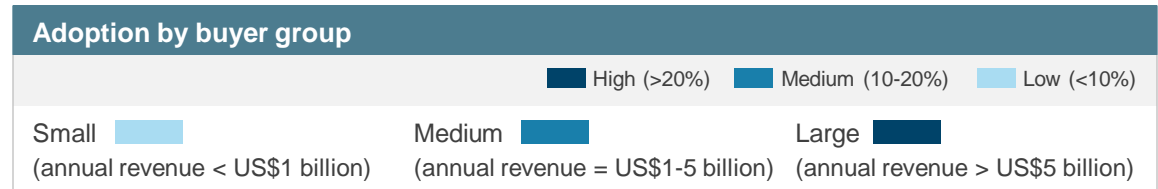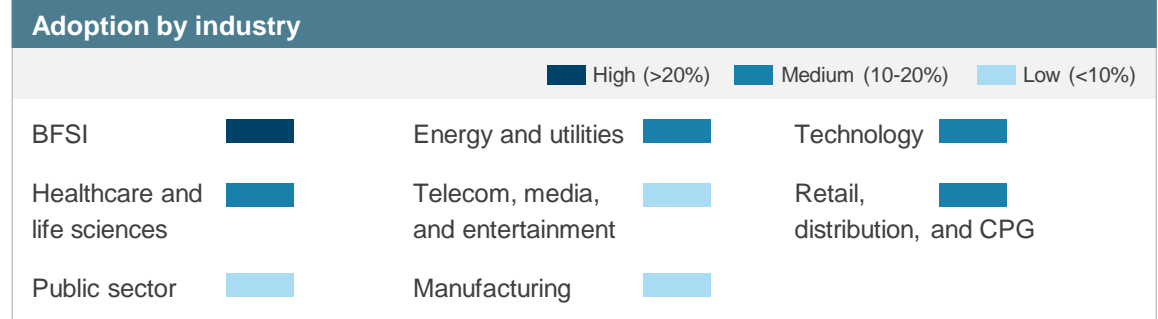
Overall cloud services revenue (2019)

<US$200 million	US$200-500 million	US$500 million- US$1 billion	>US$1 billion

Adoption by geography

High (>25%)   Medium (10-25%)   Low (<10%)

Adoption by industry

High (>20%)   Medium (10-20%)   Low (<10%)

BFSI	Energy and utilities	Technology
Healthcare and life sciences	Telecom, media, and entertainment	Retail, distribution, and CPG
Public sector	Manufacturing	

Adoption by service segments

High (>20%)   Medium (10-20%)   Low (<10%)

Consulting services	Cloud modernization services	Cloud infrastructure design/build services	Cloud operate services

Adoption by buyer group

High (>20%)   Medium (10-20%)   Low (<10%)

Small (annual revenue < US$1 billion)	Medium (annual revenue = US$1-5 billion)	Large (annual revenue > US$5 billion)

Source: Everest Group (2020)

Accenture | system integrator capabilities on AWS (page 2 of 4)
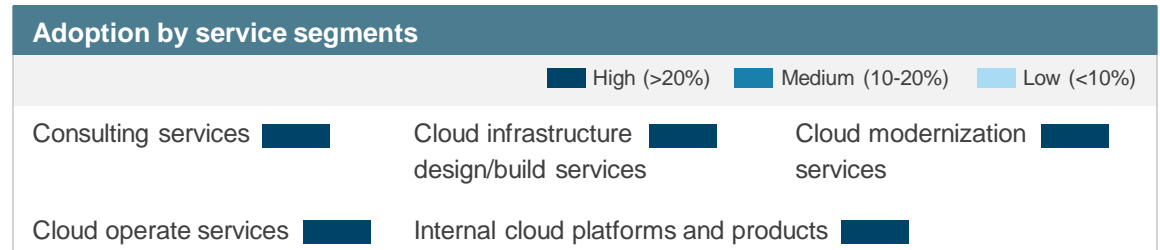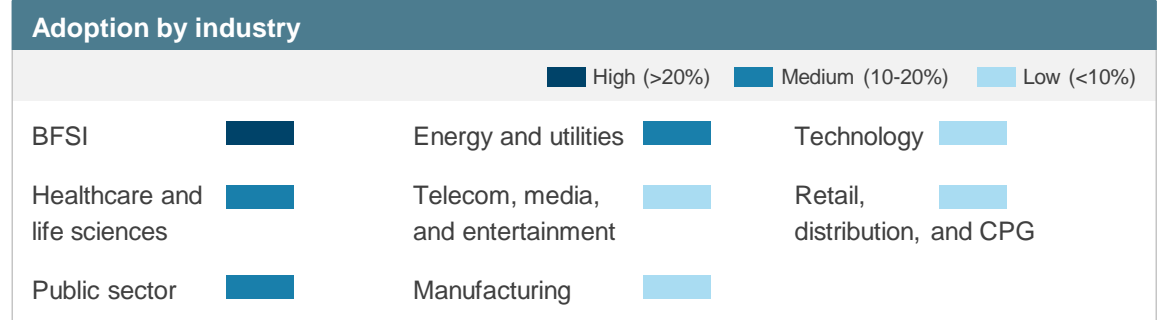## Capabilities on AWS overview

AWS partnership overview

Accenture has received Premier Consulting Partner accreditation on AWS. In 2015, it established Accenture AWS Business Group (AABG) to focus on cloud strategy, AI/ML/data, cloud native development, migration, and cloud managed services.

Revenue from AWS-related services (2019)

<US$50 million	US$50-200 million	US$200-500 million	>US$500 million
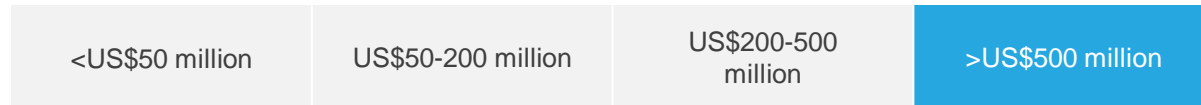
AWS portfolio – key highlights (representative list)

- It has over 20 AWS validated qualifications, which include SAP, Security, IoT, Machine Learning, Data and Analytics, DevOps, Microsoft Workloads, Managed Services, Government and Public Sector, Financial Services, and Life Sciences, among others
- AWS partner program accreditations include Authorized Government Reseller, AWS Channel Reseller, AWS Public Sector Partner Program, AWS MSP Program, and AWS Marketplace Seller
- Key use cases delivered on AWS include:
  - Applied customer engagement by combining AI, automation, and analytics to reimagine business
  - Ability to scale business-driven insights in real-time by delivering AI on AWS
  - Data transformation on AWS
  - Optimizing infrastructure and business applications through migration and modernization

Adoption by industry

High (>20%)   Medium (10-20%)   Low (<10%)

BFSI	Energy and utilities	Technology
Healthcare and life sciences	Telecom, media, and entertainment	Retail, distribution, and CPG
Public sector	Manufacturing	

Adoption by service segments

High (>20%)   Medium (10-20%)   Low (<10%)

| Consulting services | Cloud infrastructure design/build services | Cloud modernization services |
| Cloud operate services | Internal cloud platforms and products | |

Revenue by geography

High (>20%)   Medium (10-20%)   Low (<10%)

| North America (US & Canada) | Asia Pacific | United Kingdom |
| Middle East & Africa | Rest of Europe | Rest of the World |

Accenture | system integrator capabilities on AWS (page 3 of 4)
Key solutions

Proprietary solutions (representative list)	
Solution name	**Details**
myNav®	It helps to navigate the complex cloud landscape and select the right architecture and cloud solution to meet specific needs based on cost, implementation, compliance, and environmental sustainability
Sovereign cloud advisor (part of myNav)	It helps create a cloud architecture that complies with data sovereignty regulations and supports clients in understanding the implications of global data sovereignty laws and ultimately create a cloud architecture that complies with data sovereignty regulations
Green cloud advisor (part of myNav)	It provides insights into the sustainability value of cloud solutions based on cloud service provider and location greenness through simulations resulting in better energy resource management
myConcerto®	A single digitally integrated platform that accelerates and de-risks the transformation journey with a value-led approach to ROI. It supports technology-agnostic, cross-platform advisory work, and transformation work for six key platforms such as SAP, Oracle, Workday, Salesforce, Microsoft, and Adobe
myWizard®	Accenture's signature platform for intelligent software engineering and IT services delivery. It is a liquid modular platform that evolves service delivery and provides intelligence through integration of its proprietary methods, intelligent tools, and assets
Accenture Cloud Platform (part of myWizard)	The Accenture Cloud Platform (ACP) is a comprehensive and flexible service that provides global enterprises the control and knowledge they need to help them accomplish their legacy-to-cloud transformation and subsequent management of their estate
SAP CloudSuite	- SAP on cloud automation – Cloud Builder: The tool can deploy SAP industry reference architectures and can install various SAP modules in certified OS/DB combinations - SAP on cloud automation – Cloud Runner: Helps automatically manage the run schedule of SAP infrastructure in the public cloud - SAP on cloud automation – Cloud Admin: Helps to automate the BAI operations performed by the basis administrator and provides greater flexibility to execute them from a central console and in a scheduled manner
Post trading and insurance claims platform	Accenture has developed post-trading and insurance claim platforms in collaboration with Murex and Guidewire
Advanced customer engagement on AWS	It transforms the customer experiences through AI-powered conversations with Accenture's Applied Customer Engagement (ACE+) platform on AWS
Intelligent Public Safety Platform (IPSP)	IPSP addresses the immediate challenges facing public safety agencies, enabling them to respond faster and more securely while improving public safety
Telco as a service telco at the edge	Helps launch vertical industry solutions at the network edge to keep pace with B2B, B2C, and 5G desires and expectations. Powered by AWS in optimized edge cloud infrastructure and IoT capabilities, helps to reimagine industry-specific solutions at the network edge (i.e., connected vehicle, industrial IoT, AR/VR, and cloud gaming) through the launch of software-driven services
Vegetation management for utilities	Sustainable utility vegetation management includes technology capable of maintaining safe and reliable power to communities by monitoring and managing powerlines in nature

Accenture | system integrator capabilities on AWS (page 4 of 4)
Case study, investments, and recent activities

Case study	Contact center setup for a government agency to provide digital experience for callers

Client: A government agency

Business challenge
The client was experiencing abnormally high call volumes due to the COVID-19 pandemic, with people concerned about losing income and jobs.

Solution
In just a few days, Accenture launched a 3,000-person contact center to deal with spikes in call volume related to customer needs. Accenture rapidly deployed an end-to-end solution to migrate and manage operations on AWS and trained more than 1,600 agents over a weekend on how to provide support. The solution leveraged Amazon Connect and other services such as Lex and Polly to provide digital and human engagement experience for callers, many of them calling the agency for the very first time. The solution also allowed agents to work from home and new agents to be added rapidly as demand increased.

Impact
Throughout April, agents, working from home, have been handling more than 40,000 calls a day as millions of citizens have applied for financial benefits. For this effort and solution, Accenture won the 2020 AWS Public Sector Partner Award for the most innovative connect deployment.

Recent investments and activities (representative list)

Development	Details
Investment	• Invested in Accenture AWS Business Group (AABG), a partnership that combines the resources, capabilities, and industry knowledge of Accenture & AWS to accelerate cloud transformation and innovation for enterprises through adoption of AWS services • Joint transformation program – re-organize IT and business for the future with Accenture cloud transformation on AWS. Its joint transformation program with AWS supports large scale transformation programs for banking, resources, and life sciences • Industry solution designed and built with AWS to leverage full power of the AWS platform and industry knowledge of Accenture

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Accenture
Everest Group assessment – Leader

Measure of capability: ● High ◔ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
●	●	●	●	●	◔	●	◕	◕

Strengths

- Accenture delivers a broad range of AWS services across infrastructure, platforms, data, and next-generation segments. It has one of the highest number of AWS qualifications including competencies, partner programs, and service validations
- Through its Cloud Innovation Centers (CICs), labs, and studios, Accenture is driving innovation and providing its clients an opportunity for hands-on learning on new products and features
- Clients have identified strategy development, program management, migration planning, and strong collaboration with AWS as the biggest strengths for Accenture
- It continues to win large deals by placing heavy emphasis on innovative architecture and joint transformation initiative with AWS through its Accenture AWS Business Group while taking commercial risks associated with business outcomes
- It has successfully leveraged its myNav offering to create strong business cases, select optimum cloud architectures/solutions, and provide clarity through solution simulations. Relevant for clients who prefer tailor-made cloud transformation initiatives

Areas of improvement

- To further augment capabilities, Accenture needs to develop competencies on the AWS-native hybrid cloud solution such as AWS Outposts
- Though Accenture possesses good cloud automation capabilities and IPs, enterprise clients have pointed out that Accenture can be more proactive in identifying automation opportunities and building implementation roadmap
- Clients have cited that some of the skillsets brought onto their environments, for example, AWS CloudFormation, were lacking required hands-on experience
- Clients perceive it to lack contracting flexibility owing to its push to embed its in-house IPs and platforms. Accenture may need to enhance its flexibility in designing solutions based on client's appetite and context

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Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

Everest Group PEAK Matrix
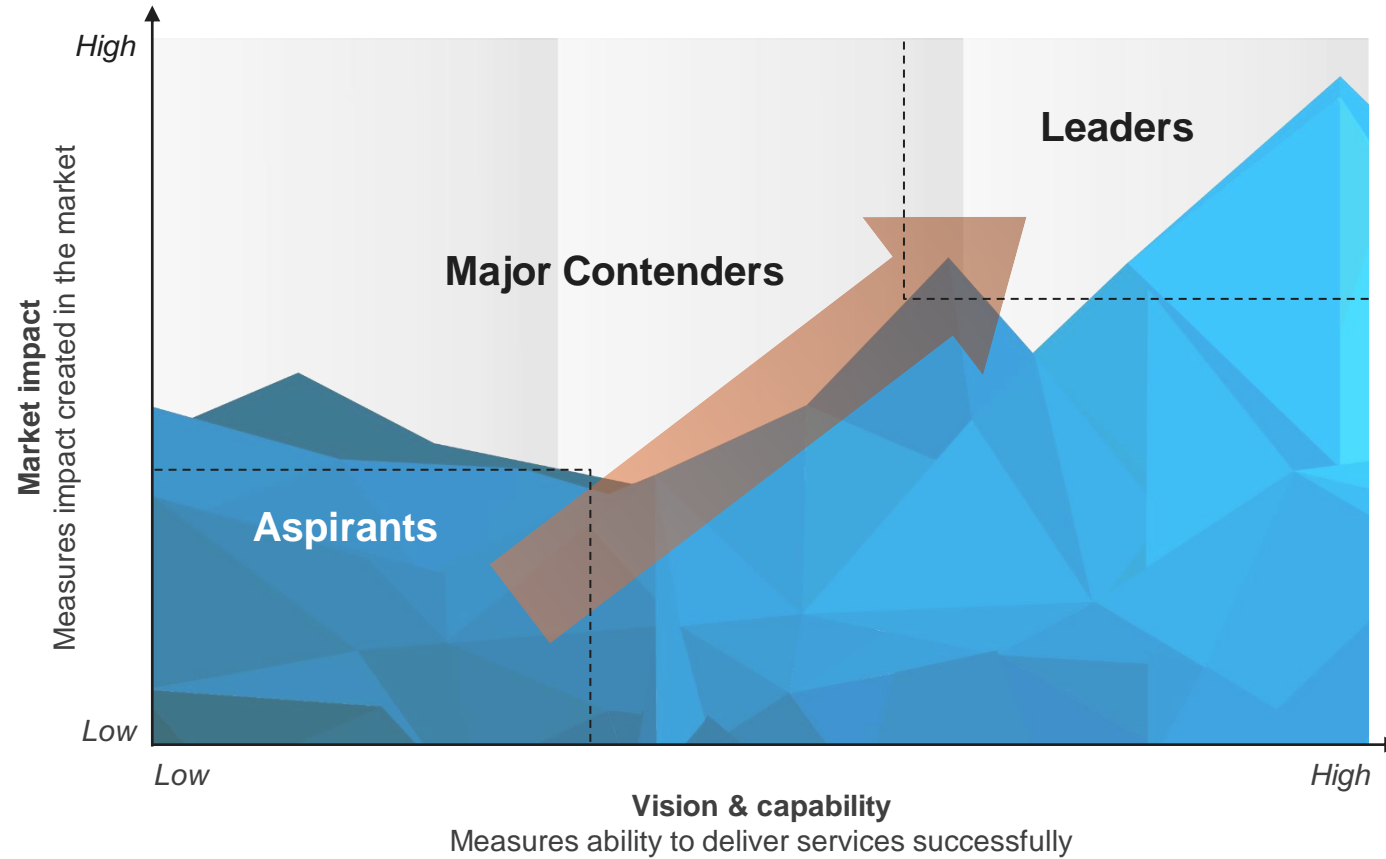
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

| **Market adoption** |
| Number of clients, revenue base, YOY growth, and deal value/volume |

| **Portfolio mix** |
| Diversity of client/revenue base across geographies and type of engagements |

| **Value delivered** |
| Value delivered to the client based on customer feedback and transformational impact |

Market impact

Leaders

Major Contenders

Aspirants

Vision & capability
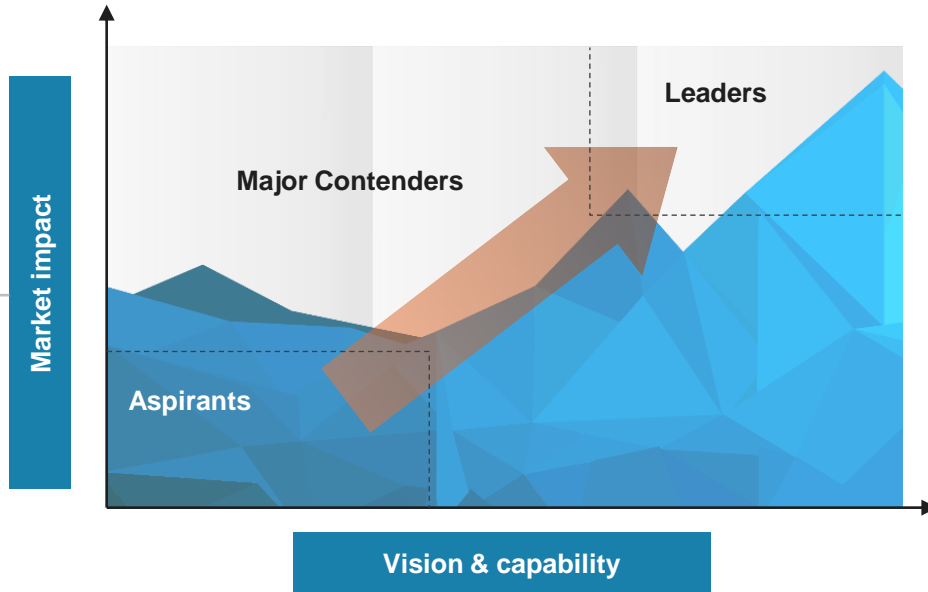
Measures ability to deliver services successfully. This is captured through four subdimensions

| **Vision and strategy** | **Scope of services offered** | **Innovation and investments** | **Delivery footprint** |
| Vision for the client and itself; future roadmap and strategy | Depth and breadth of services portfolio across service subsegments/processes | Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc. | Delivery footprint and global sourcing mix |

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?
Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging system integrator / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a "Major Contender" or "Aspirant" on the PEAK Matrix, an unfavorable outcome?
No. The PEAK Matrix highlights and positions only the best-in-class system integrators / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the "PEAK Matrix position"?
A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a "Leader", "Major Contender," or "Aspirant" title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?
- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own "profile" that is published by Everest Group as part of the "compendium of PEAK Matrix providers" profiles

What is the process for a system integrator / technology vendor to leverage their PEAK Matrix positioning and/or "Star Performer" status ?
- Providers/vendors can use their PEAK Matrix positioning or "Star Performer" rating in multiple ways including:
  – Issue a press release declaring their positioning. See citation policies
  – Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
  – Quotes from Everest Group analysts could be disseminated to the media
  – Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?
PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises

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With you on the journey

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